

13

Organization Change Submissions- Minor


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13.0 Organization Change- Minor Introduction


 *Note: The System identifies whether a submission is a major or minor organization change.*

Minor Organization Change Submissions will allow an entity to make minor changes to its organization structure. These submissions will not require HUD review.

- The organization must have completed a Baseline Submission and must be an "active" organization (i.e., have not been bought out by another organization).
- Users can change only the following information for principals in the applicant organization:
 - Starting date in the organization
 - Role in the organization (except for changes to Limited Partner, General Partner or Managing General Partner)
 - Ownership percent (other than changing a partner's ownership to more than 25% or a non-partner's ownership to more than 10%).
- Users can remove principals from the applicant tier. When removing a principal, the User must specify their ending date in the applicant organization. The ending date must be greater than or equal to the principal's beginning date in the applicant organization. After removing principals, an organization must have at least one principal left who is an individual.

 *Note: Use this submission to edit or remove principals, change a principal's role, or starting date in an organization.*

 *Note: A principal's role within an organization can be changed to anything other than Limited Partner, General Partner, or Managing General Partner.*

 *Note: A General Partner, Managing General Partner, or Limited Partner may change their percentage of ownership to less than 25%. All other roles may change their percentage of ownership to less than 10%.*

13.1 Editing a Principal

1. Follow the process for an Organization Change Major submission. (Refer to Chapter 11)
2. **The 2530 Submission Edit Organization Structure** screen will display, select the principal to be edited.

Active Partners Performance System

2530 Submission
Edit Organization Structure

Submission ID: 11666 Reason: Organization Change (Major)

Applicant: Test 3 Corporation (600000003) Current Status: In Process, 05/15/2006


Parent Participant: Test 3 Corporation (600000003), Cincinnati, OHIO


Select	Name	Type	Role	Ownership Percent	Begin Date in Organization	Change
<input type="radio"/>	Doe, James (111222666)	Individual	Member	0	05/22/2005	
<input type="radio"/>	Test 2 Corp (111222888)	Organization	Member	23	06/12/2005	

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Figure 13-1: 2530 Submission Edit Organization Structure Screen

3. Click . The Edit Principal within an Organization screen displays.




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User ID:
MXXXXX

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Edit Principal within Organization

Prefix:

* First Name:

Middle:

* Last Name:

Suffix:

* SSN:

Physical delivery address

* Address:

* City:

* State:

* Zip Code: -

* Country:

If country not United States

Territory:

* Postal Code:

* Phone:

Fax:

E-mail:

Pager:

Parent Participant:

* Role in Entity:



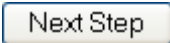
Role Comment:


* Percent Ownership in Entity: % (100.00)

* Starting Date in Entity: - - (mm-dd-yyyy)

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Figure 13-2: Edit Principal within Organization Screen

4. Make the necessary edits to the principal.
5. Click . The screen refreshes with the message, “Save was successful.”
6. Click . The Organization Structure screen displays.
7. Repeat the process if necessary.
8. Click on . The 2530 Submission Edit Contact Information screen will display



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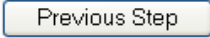
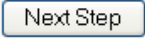
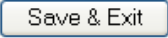

***2530 Submission
Edit Contact Information***

Submission ID: 11647 **Reason:** Organization Change (Court Order/Inheritance)

Applicant: Test 3 Corporation **Current Status:** In Process, 04/26/2006
(6000000003)

Contact Information

* Name:	Ken
* Phone:	Ken
Fax:	
Email:	
Pager:	

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Figure 13-3: 2530 Submission Edit Contact Information screen

9. Edit necessary Contact Information and click on [Next Step](#). The 2530 Submission Edit Applicant Comments screen will display

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2530 Submission
Edit Applicant Comments

Submission ID: Reason:

Applicant:

Current Status:

Applicant Comments:

[Previous Step](#) [Next Step](#) [Save & Exit](#) [Cancel Submission](#)

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Figure 13-4: 2530 Submission Edit Applicant Comments screen

10. Enter necessary comments

13.2 Removing a Principal

1. To remove a Principal, on the 2530 Submission, Edit Organization Structure screen, select the principal to be removed.



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2530 Submission

Edit Organization Structure

Submission ID: 11641 Reason: Organization Change (Major)

Applicant: Test 2 Corp (111222888) Current Status: In Process, 04/25/2006

Parent Participant: Test 2 Corp (111222888), Springfield, VIRGINIA

Select	Name	Type	Role	Ownership Percent	Begin Date in Organization	Direct Previous Participation	Certified	Change
<input type="radio"/>	Doe, James (111222666)	Individual	Member	0	12/11/2005	No	Yes	
<input type="radio"/>	SP Test (999999993)	Individual	Limited Partner	5	05/03/2002	No	Yes	Add

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Figure 13-5: Organization Structure Screen

2. Click Remove Principal. The Remove Principal from Organization screen displays.



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MXXXX

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Remove Principal from Organization

Prefix:

First Name:

Middle:

Last Name:

Suffix:

* SSN:

Physical delivery address

Address:

City:

State:

Zip Code:

Country:

If country not United States

Territory:

Postal Code:

Phone:

Fax:

E-mail:

Pager:

Parent Participant:

Role in Entity:

Role Comment:

Percent Ownership in Entity:

Starting Date in Entity: (mm-dd-yyyy)

Ending Date in Entity: - - (mm-dd-yyyy)

or

Check here if principal originally added in error: ☐


Figure 13-6: Remove Principal from Organization Screen


5. Enter the Ending Date in the Entity.
6. Click Remove Principal . The Organization Structure screen displays with the message, “Principal has been removed successfully.”
7. The Organization Structure screen displays the new structure.


13.3 Sending a Submission to HUD

Click Next Step till you reach the 2530 Submission Send to HUD screen.

Refer to Chapter 7, Editing Sending, Canceling, Withdrawing Submissions, Section 7.2, Sending a Submission to HUD

 *Once sent to HUD the status will change from “In Process” to “PPSD Review.”*

 *Note: Make sure at least one individual is in the company before sending it to HUD.*

 *If the participants in your organization structure have previous participation that is different from the applicant, they are required to submit their own 2530 for this submission.*

13.4 Printing the Signature List and Previous Participation Certification

Refer to Chapter 16, Printing Submissions

13.5 Querying the Submission

Refer to Chapter 17, Submission Queries